

The Geography of Comparative Welfare State Research: A Comment

Hort, Sven E. O.

Postprint / Postprint

Zeitschriftenartikel / journal article

Zur Verfügung gestellt in Kooperation mit / provided in cooperation with:

www.peerproject.eu

Empfohlene Zitierung / Suggested Citation:

Hort, S. E. O. (2005). The Geography of Comparative Welfare State Research: A Comment. *Global Social Policy*, 5(1), 14-17. <https://doi.org/10.1177/146801810500500103>

Nutzungsbedingungen:

Dieser Text wird unter dem "PEER Licence Agreement zur Verfügung" gestellt. Nähere Auskünfte zum PEER-Projekt finden Sie hier: <http://www.peerproject.eu>. Gewährt wird ein nicht exklusives, nicht übertragbares, persönliches und beschränktes Recht auf Nutzung dieses Dokuments. Dieses Dokument ist ausschließlich für den persönlichen, nicht-kommerziellen Gebrauch bestimmt. Auf sämtlichen Kopien dieses Dokuments müssen alle Urheberrechtshinweise und sonstigen Hinweise auf gesetzlichen Schutz beibehalten werden. Sie dürfen dieses Dokument nicht in irgendeiner Weise abändern, noch dürfen Sie dieses Dokument für öffentliche oder kommerzielle Zwecke vervielfältigen, öffentlich ausstellen, aufführen, vertreiben oder anderweitig nutzen.

Mit der Verwendung dieses Dokuments erkennen Sie die Nutzungsbedingungen an.

gesis
Leibniz-Institut
für Sozialwissenschaften

Terms of use:

This document is made available under the "PEER Licence Agreement". For more Information regarding the PEER-project see: <http://www.peerproject.eu>. This document is solely intended for your personal, non-commercial use. All of the copies of this documents must retain all copyright information and other information regarding legal protection. You are not allowed to alter this document in any way, to copy it for public or commercial purposes, to exhibit the document in public, to perform, distribute or otherwise use the document in public.

By using this particular document, you accept the above-stated conditions of use.

Mitglied der

Leibniz-Gemeinschaft

- Sklar, M.J. (1988) *The Corporate Reconstruction of American Capitalism, 1890–1916: The Market, the Law, and Politics*. Cambridge: Cambridge University Press.
- Slaughter, A.-M. (2004) *A New World Order*. Princeton, NJ: Princeton University Press.
- Weber, M. (1978) *Economy and Society*. Berkeley: University of California Press.
- Zakaria, F. (2003) *The Future of Freedom: Illiberal Democracy at Home and Abroad*. New York: Norton.

SVEN E.O. HORT

Södertörn University College, Sweden

The Geography of Comparative Welfare State Research: A Comment

(SVEN E. O. HORT is Professor of Sociology at Södertörn University College in Stockholm, Sweden)

In 2004, the United Nations (UN) had 191 member-states. Far from all of them would be labelled welfare states, although many of them pretend to belong to that category. When Harold Wilensky (1975) pioneered comparative welfare state research some 40 years ago, his sample from 1966 consisted of 64 countries at a time when the UN had 119 member-states. However, his analysis focused on the 22 most developed welfare states (see also Wilensky, 2002). And so it has been, until recently.

Wilensky's sample included the core West European countries, Israel, Canada and the USA in North America, three East European countries (Czechoslovakia, Poland and Hungary), Australia and New Zealand in the Pacific. Japan was number 23 on the list. Thus, this was the geography of advanced welfare states on the globe – minus Japan (Wilensky 1975). In analytical terms, Wilensky made a distinction between four types of welfare states: liberal democratic, totalitarian, authoritarian oligarchic, and authoritarian populist. In 1990, when Gösta Esping-Andersen published *The Three Worlds of Welfare Capitalism*, a work that in many ways summarized the research that had followed in the tracks of Wilensky, his sample had shrunk to 18 countries: Japan was included, Israel was gone and, most important, the East European countries had disappeared. The three 'worlds' made up the combined world of advanced capitalism and liberal democracy. Thus, democracy, or Western state- and nation-building more generally, had become a key indicator in the selection of research objects although also the decline in social development should not be forgotten. Nevertheless, it is probably too early to forget the various forms of authoritarian welfare states that hitherto have existed.

Since the early 1990s, the geography of comparative welfare state research has changed dramatically. Hence, globalization, and in particular global

democratization, has left its stamp on social research in this field of inquiry. This is also reflected in the themes of the articles included in this special issue, and more generally in this journal so far. The role of international organizations is highlighted in innovative ways in pension as well as in tax policy. New themes in comparative welfare state research have also seen the light of day such as the role of global antitrust legislation and its impact on local politics.

However, the role of the national welfare state will continue to exercise its significance also in the years and most likely also decades to come. Again it is the coming of new welfare states that will set the agenda. Outside the old core, it is in particular three zones that have come into the fore: the new Europe, East and Southeast Asia and (parts of) Latin America.

With the enlargement of the European Union (EU), already from the second half of the 1980s the old dictatorships of Southern Europe were brought into the limelight: Greece, Portugal and Spain became part of a 'southern model' (Ferrera, 1996). However, it was only with the demise of the Soviet empire and the transformation of the previously planned economies that the welfare states of Central and Eastern Europe returned into focus. Again, it was the countries that Wilensky once had singled out which were taken into consideration by in particular continental welfare state research: the Visegrad countries of the Czech Republic, Hungary, Poland and Slovakia – and Slovenia from the former Yugoslavia, a country in socio-economic terms at the level of Greece. Later on, as the EU enlargement process continued, also other parts of Eastern Europe including the new Baltic states from the former Soviet Union and their systems of social protection became part and parcel of the research agenda (Aidukaite, 2004). When 10 new member-states entered the EU on 1 May 2004, a new 'Social Europe' also was born.

Another case in point is East and Southeast Asia. From the early 1980s when Japan was 'upgraded' by the OECD as a 'welfare society' against the old-fashioned welfare states of the West, not only this country but also the four small tigers of Hong Kong, Korea, Singapore and Taiwan gradually became part of comparative social research. However, only with the coming of the 'East Asian Miracle' did growth with or without welfare become a bone of contention. Did the rapidly developing countries and territories of the new East follow the glacial river of time or did they go against the neo-liberal wave? In an overview a few years back in time, the preliminary answer given was that state involvement in the field of welfare was introduced at an earlier stage in the process of modernization as compared to the old welfare states, and that the expansion of welfare institutions closely followed rapid economic growth in the period up to the Asian financial crisis of 1997–8. Furthermore, no decline of social policy efforts or a dismantling of the – still relatively small – welfare state was particularly visible in the years following that crisis (Hort and Kuhnle, 2000).

A third area is Latin America. Apart from Scandinavia, according to a recent North American overview of comparative welfare state research, this backyard of the North American empire figures more pre-eminently than any other part of the world including both Central and Eastern Europe and East and Southeast Asia (Huber and Stephens, forthcoming). There too, it is the dramatic impact of economic transformation on the system of social protection that comes to the fore.

In all three parts of the old but new globe certain questions will be more prominent than others. Pensions are cases in point that have frequently been on the agenda, also in this special issue of *Global Social Policy*. These are gendered issues that so far need to be further scrutinized. Furthermore, gender, child and family policy in a broad sense is of course another issue of crucial importance in most parts of the world (cf. Therborn, 2004). In many aspects of equal importance but less researched is the emergence of unemployment insurance, employment policy and labour protection in general. In particular in East and Southeast Asia as well as in the new Central and Eastern Europe there were never any unemployment insurance systems, and so far developments have been extremely slow.

In total, 25 new and old countries in Europe belong to the EU and all of them will sooner rather than later be counted as welfare states. Together with what remains of the old core (being outside the EU – Iceland, Norway, Switzerland, Australia, New Zealand, Canada, and the USA), roughly a handful of new welfare states in East and Southeast Asia and another 5 to 10 Latin American welfare states will altogether make up almost as many cases as were included in Wilensky's original full sample. This is the new 'social globe' where people live their lives and try to influence the way their lives are arranged and rearranged through pre-existing or emerging organizations and institutions (Ahrne and Papakostas, 2002). Moreover, to excavate the normative issues of the future should not be forgotten in empirical social research (cf. Rothstein, 1998; Kildal and Kuhnle, forthcoming). These are areas in space and time where social scientists will have to explore the intricate relationships between work and welfare, tax policy and pension programmes, the regulation of markets, political and social mobilization, institution-building, etc. Whether another 140 cases are in the pipeline is too early to tell.

REFERENCES

- Ahrne, G. and Papakostas, A. (2002) *Organisationer, Samhälle och Globalisering* [Organizations, Society and Globalization]. Lund: Studentlitteratur.
- Aidukaite, J. (2004) 'The Emergence of the Post-Socialist Welfare State: The Case of the Baltic States', PhD thesis, Baltic and East European Graduate School, Södertörn University College, Stockholm.
- Esping-Andersen, G. (1990) *The Three Worlds of Welfare Capitalism*. Cambridge: Polity Press.

-
- Ferrera, M. (1996) 'The Southern Model of Welfare in Social Europe', *Journal of European Social Policy* 6(1): 17–37.
- Hort, S.E.O. and Kuhnle, S. (2000) 'The Coming of East and Southeast Asian Welfare States', *Journal of European Social Policy* 10(2): 162–84.
- Huber, J. and Stephens, J. (forthcoming) 'The Welfare State and Economy', in N. Smelser and R. Swedberg (eds) *Handbook of Economic Sociology*. New York and Princeton, NJ: Russell Sage Foundation and Princeton University Press.
- Kildal, N. and Kuhnle, S. (eds) (forthcoming) *Normative Foundations of the Welfare State: The Nordic Experience*. London: Routledge.
- Rothstein, B. (1998) *Just Institutions Matter: The Moral and Political Logic of the Universal Welfare State*. Cambridge: Cambridge University Press.
- Therborn, G. (2004) *Between Sex and Power*. London: Routledge.
- Wilensky, H. (1975) *The Welfare State and Equality*. Berkeley: University of California Press.
- Wilensky, H. (2002) *Rich Democracies*. Berkeley: University of California Press.